



# Streaming video opportunities for operators: consumer survey



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## About this report

Telecoms operators play an important and expanding role as a retail channel for streaming video services. Analysys Mason's annual *Consumer survey* of 21 000 consumers worldwide indicates that customers that purchase streaming services through operators have higher levels of satisfaction and are less likely to churn than those customers that only purchase direct-to-consumer (D2C) services.

The survey was conducted in association with Dynata and OnDevice Research between July and September 2023. The survey groups were chosen to be representative of the internet-using population in selected countries around the world. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents per country.<sup>1</sup>

### KEY QUESTIONS ANSWERED IN THIS REPORT

- How is service stacking evolving and what does this mean for the level of competition in the streaming video market?
- How important are telecoms operators as a retail channel for streaming video services?
- How much do video service providers benefit from bundling streaming video services with telecoms services compared to telecoms service providers?
- What is the business case for aggregating streaming video services?



### GEOGRAPHICAL COVERAGE

- **Western Europe (WE):** France, Germany, Ireland, Italy, Norway, Spain, Sweden and the UK
- **Central and Eastern Europe (CEE):** Poland and Turkey
- **North America (NA):** Canada and the USA
- **Developed Asia-Pacific (DVAP):** Australia and New Zealand
- **Emerging Asia-Pacific (EMAP):** Malaysia
- **Sub-Saharan Africa (SSA):** South Africa
- **The Middle East and North Africa (MENA):** Kuwait, Saudi Arabia, Oman and the UAE



### WHO SHOULD READ THIS REPORT

- Strategy, product and partnership teams within **telecoms operators** that want to understand the changing value of streaming video services and want to assess how successful a role they can play as a sales channel and service aggregator.
- Strategy managers and sales managers within **streaming video providers** that wish to understand consumers' requirements and attitudes.
- Sales and product teams within **software vendors** that provide the billing or content delivery software that enables content aggregation and suites of multimedia value-added services (VAS) for telecoms operators.

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<sup>1</sup> 750 respondents in surveyed countries in the Middle East and North Africa.



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Executive summary





Results

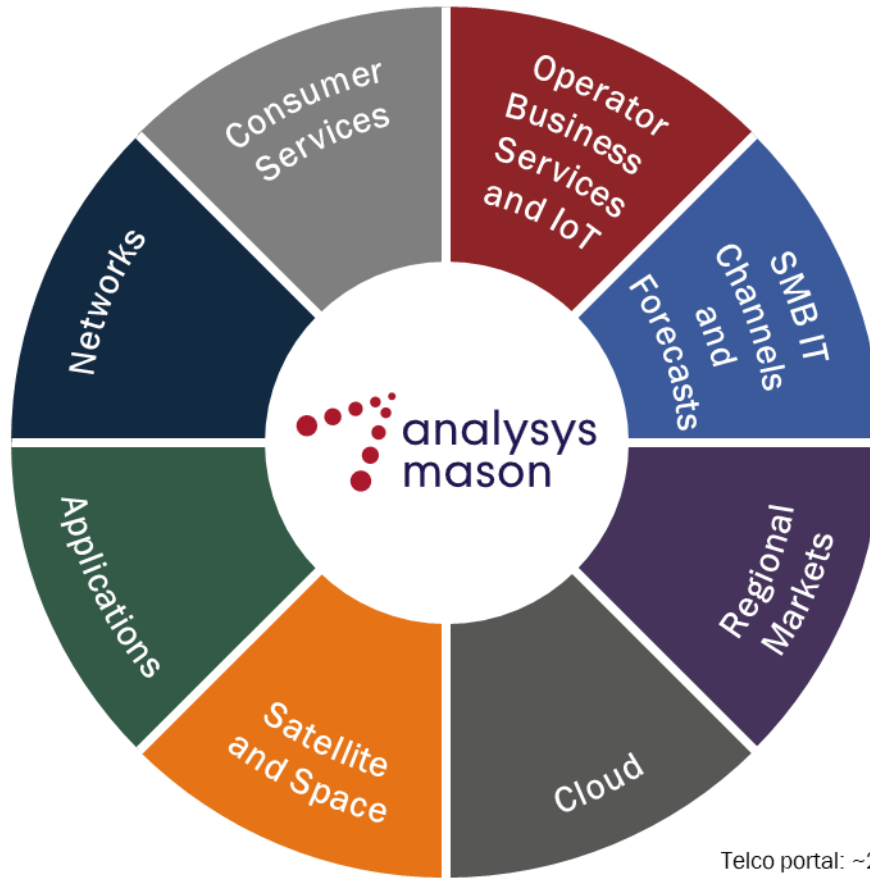
Appendix

Methodology and panel information

**About the authors and Analysys Mason**

# Our research services

- 
**Consumer Services**
  - Fixed Broadband Services
  - Mobile Services
  - Fixed-Mobile Convergence
  - Smart Devices
  - Future Comms
  - Video, Gaming and Entertainment
- 
**Networks**
  - Next-Generation Wireless Networks
  - Wireless Infrastructure Strategies
  - Fibre Infrastructure Strategies
  - Operator Investment Strategies
  - Telecoms Strategy and Forecast
  - Transport Network Strategies
- 
**Applications**
  - Network Automation and Orchestration
  - Customer Engagement
  - Monetisation Platforms
  - Digital Experience
  - Automated Assurance
  - Service Design and Orchestration
  - Telecoms Software Market Shares
- 
**Satellite and Space**
  - Satellite Strategies for Telcos
  - Satellite Capacity
  - Satellite Infrastructure
  - Satellite Mobility




- 
**Operator Business Services and IoT**
  - Enterprise Services
  - SME Services
  - IoT Services
  - Private Networks
  - Cyber Security

**SMB Technology Forecaster**

- 
**Regional Markets**
  - Global Telecoms Data and Financial KPIs
  - Americas
  - Asia-Pacific
  - Middle East and Africa
  - European Core Forecasts
  - European Telecoms Market Matrix
  - European Country Reports

- 
**Cloud**
  - Cloud Infrastructure Strategies
  - Data, AI and Development Platforms
  - Edge and Media Platforms
  - Multi-Cloud Networking

- 
**DataHub**
  - Forecast data for 80 countries

Telco portal: ~2800 forecast and ~320 historical metrics  
 SMB Technology Forecaster portal: ~120 000 forecast metrics

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